

2011 Exit Survey Profile of Non-residents Visiting The Western Region (Economic Zones 6-10)



"Western Region Sites and Attractions"



Government of Newfoundland and
Labrador
Tourism Research Division
Department of Tourism, Culture and
Recreation

2011 Exit Survey – Profile of Visitors to the Western Region

PROJECT OVERVIEW

The 2011 Exit Survey served to update and enhance existing historical information on non-resident visitors to this province. The program was undertaken to improve annual estimates of visitation and expenditure as well as to update visitor characteristics.

In addition to visitor characteristics, the survey also served to provide insight into visitors' motivations, attitudes, perceptions and opinions related to various aspects of our Tourism offering.

METHODOLOGY

Interviews were conducted with individuals leaving the province through four major exit points. The 2011 Exit Survey Program covered all vehicle-related exit points from the Island portion of the province (Port Aux Basques and Argentia) and the major air exit points — St. John's and Deer Lake which represented 81% of all boarding passengers at the province's seven major airports.

At each exit point, a short survey (referred to as partition survey) was administered using palm pilot technology to gather key information and identify non-resident visitors exiting the province. A longer survey (referred to as main survey) was distributed to all willing non-resident travelers at each exit point.

The partition survey collected information related to origin, trip purpose, party size, length of stay and party composition. The main survey collected data on the characteristics of non-resident visitors, including destinations visited, participation in activities, expenditures and demographics.



Overall, a total of 17,279 partition interviews were conducted with non-residents exiting the province at the four exit points and 4,083 questionnaires (main surveys) were returned. Survey participants had the option of returning the main questionnaire via drop boxes at the exit points, by mail or responding online.

Table 1 shows the breakdown of surveys collected.

Table 1
2011 Exit Survey Program
Number of Non-Residents Surveyed

Survey	Air Jan-Apr Nov-Dec	Air May-Oct	Auto May-Oct	Total
Partition	2,853	10,972	3,454	17,279
Main	506	2,060	1,517	4,083

A detailed weighting system was applied to ensure the survey sample reflected the exiting non-resident population. It should be noted that the margin of error associated with the data varies depending on the size of the sample. Margin of error increase as sample sizes decrease.

Profile of Non-residents Visiting the Western Region (Economic Zones 6-10)

This **Profile** report focuses on non-resident visitors who reported an overnight visit to the Western Region (Economic Zones 6-10) during the peak travel season of May to October.

The total estimate of non-resident parties visiting Newfoundland and Labrador during the May to October period is 158,456, with 38% reporting they had an overnight visit to the Western Region.

It is estimated that between May and October 2011 approximately 60,816 travel parties or 133,300 non-residents reported an overnight visit to the Western Region (Economic Zones 6-10).

As can be seen in **Table 2**, Economic Zone 7 (Gros Morne area) attracted almost one quarter (23.2%) of the visitors to the province and accounted for 8.8% of the nights spent in the province with an average stay of 3.5 nights.

Table 2
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region By Economic Zone
(% Parties – May to October)

	% of Parties	% of Nights	Average Stay
Economic Zone 6	12.3%	3.6%	2.7
Economic Zone 7	23.2%	8.8%	3.5
Economic Zone 8	12.3%	4.3%	3.2
Corner Brook Area	11.5%	4.1%	3.3
Economic Zone 9	6.0%	3.4%	5.3
Economic Zone 10	8.2%	2.0%	2.3

% of parties and average stay are not additive across Zones. For Economic Zones, refer to the map at the back of this document.

MODE OF TRAVEL TO PROVINCE

Sixty one percent of the non-resident parties reporting an overnight visit to the Western Region came to the province by air. This is the lower than the overall distribution of visitors by this mode of travel.

Table 3
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
By Mode
(% Parties – May to October)

	Overall %Parties	Western Region Overnight Visit % Parties
Air Visitors	79%	61%
Automobile Visitors	21%	39%



ORIGIN

Travellers from Ontario accounted for over one third (35%) of non-residents reporting an overnight trip to the Western Region.

Table 4 presents the origins of travel parties who visited the province and reported an overnight trip to the Western Region in 2011. Over one third (35%) came from Ontario, the province's largest source market. With almost one quarter (23%), residents of the Maritimes accounted for the second largest share of travel parties reporting an overnight trip to the Western Region.

In terms of other markets, residents from Other Canada represented 22% of non-resident parties

reporting an overnight trip to the Western Region while 6% arrived from Quebec. As well, 11% travelled from the United States while an additional 5% were from overseas.

Parties reporting an overnight trip to the Western Region during their visit to the province were very similar when compared to travellers in general.

Table 4
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
By Origin
(% Parties – May to October)

	Overall %Parties	Western Region Overnight Visit % Parties
Maritimes	27%	23%
Quebec	5%	6%
Ontario	35%	35%
Other Canada	20%	22%
United States	9%	11%
Overseas	4%	5%

PURPOSE OF TRIP TO PROVINCE

More than one half (55%) of non-resident parties reporting an overnight trip to the Western Region travelled to the province for vacation/pleasure.

As can be seen in **Table 5**, over one half (55%) of non-resident parties reporting an overnight visit to the Western Region travelled to the province for vacation/pleasure while another 31% came to visit friends/relatives.

Ten percent were in the province for business reasons and only 2% of those reporting an overnight trip to the Western Region came to attend a convention or conference.

Compared to all travellers in general, parties reporting an overnight trip to the Western Region were more

likely to be in the province for vacation/pleasure purposes and less likely to be in the province for business reasons.

Table 5
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
By Purpose of Trip to the Province
(% Parties – May to October)

	Overall %Parties	Western Region Overnight Visit % Parties
Vacation/Pleasure	34%	55%
VFR	31%	31%
Business	27%	10%
Convention/Conference	5%	2%
Other Reasons	3%	2%

PARTY SIZE & PARTY COMPOSITION

Average Party Size

The average party size for parties reporting an overnight visit to the Western Region was 2.1 individuals. Compared to all visitors, parties reporting an overnight visit to the Western Region were slightly larger.

Table 6
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
Average Party Size
(May to October)

	Overall	Western Region Overnight Visit
Average Party Size	1.8	2.1



Party Composition

Almost two fifths (39%) of non-resident parties reporting an overnight visit to the Western Region consisted of couple(s) with no children, with an additional 30% travelling alone. Eighteen percent of those reporting an overnight visit to the Western Region (Economic Zones 6-10) travelled to the province with other family members.

Compared to non-resident travellers in general, parties reporting an overnight visit to the Western Region were more likely to be travelling as couple(s) without children and less likely to be travelling alone.

Table 7
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
Party Composition (% Parties May to October)

	Overall %Parties	Western Region Overnight Visit % Parties
Alone	46%	30%
Couple(s), no children	27%	39%
Couple(s), with children	4%	5%
Other Family	14%	18%
Group of Friends	4%	7%
Business Associates	4%	2%

LENGTH OF STAY

As can be seen in **Table 8** below, non-residents stayed, on average, 10.4 nights in the province. Parties reporting an overnight visit to the Western Region stayed in the province 1.5 nights longer at 11.8 nights while the average stay in the Western Region was 6 nights.

The Western Region (Economic Zones 6-10) accounted for one quarter (26%) of the nights spent in the province (also see **Table 2**).

Table 8
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
Average Length of Stay
 (May to October)

Overall (Province)	Western Region Overnight Visitors (Province)	Western Region Overnight Visitors (Region)	Western Region % of Nights
10.4	11.8	6.0	26.2%



IN-PROVINCE EXPENDITURES

Travellers reporting an overnight visit to the Western Region reported higher than average in-province expenditures.

As can be seen in **Table 9**, non-resident travel parties reporting an overnight visit to the Western Region had average in-province per party expenditures of \$2,253 and an average in-province per person expenditure of \$1,097.

On a per person per night basis, travel parties who reported an overnight trip to the Western Region reported an average in province expenditure of \$122.

Compared to all non-resident travel parties, parties reporting an overnight visit to the Western Region reported higher than average in-province per party and per person expenditures.

Specifically, per party and per person expenditures were approximately 29% and 14% higher respectively than the overall average.

Given the slightly larger party size and longer length of stay, the person per night expenditure for parties reporting an overnight visit to the Western Region was lower (-11%) than the overall average.

Table 9
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region
In-Province Expenditure Levels (May to October)

	Overall	Western Region Overnight Visit
Average per Party Expenditure	\$1,751	\$2,253
Average per Person Expenditure	\$960	\$1,097
Average per person per Night Expenditure	\$137	\$122

ACCOMMODATION NIGHTS

The largest share of nights by non-resident parties reporting an overnight visit to the Western Region was spent in houses of relatives (25%) followed by nights spent at hotels/motels (23%). In terms of other commercial accommodations, 14% of nights of those visiting the Western Region on an overnight trip were spent in B&Bs/Country Inns and 11% at national, provincial and other commercial campgrounds.

Compared to all travellers, non-resident parties visiting the Western Region on an overnight trip were more likely to stay in a B&B/Country Inn and at campgrounds. In addition, over 6 in 10 nights (61%) spent by those with an overnight visit to the Western Region were spent in paid accommodations. This compares to 52% for all travellers.

Table 10
2011 Non-Resident Parties Reporting an Overnight Visit to the Western Region: % of Party Nights by Type of Accommodation (May to October)

	Overall % of In-province Nights	Western Region Overnight Visit % of In-province Nights
Hotel/Motel	26%	23%
Commercial Cabins/Cottages	4%	6%
B&B/Country Inns	9%	14%
Houses of Relatives	28%	25%
Houses of Friends	9%	5%
Private Cabins/Cottages	5%	6%
Campgrounds – All Types	6%	11%
Other Types of Accommodation	12%	9%



IN-PROVINCE ACTIVITIES

Non-resident visitors reporting an overnight visit to the Western Region (Economic Zones 6-10) were actively participating in outdoor and nature-based activities.

Table 11
2011 Non-Resident Travel Parties Reporting an Overnight Visit to the Western Region
In-Province Participation in Nature and Outdoor Activities
(% Parties – May to October)

Table 11 presents the varying participation levels in outdoor and nature-based activities, showing that those visitors reporting an overnight visit to the Western Region pursued activities to a much greater extent than visitors in general but to a lesser extent than those visiting for vacation/pleasure.

Many of the activities with higher than average participation rates are present in the Western Region.



	Overall	Vacation/Pleasure Visitors	Western Region Overnight Visitors
Scenic touring	67%	83%	74%
Pleasure walking in/around communities	64%	77%	70%
Visit a National Park	34%	59%	59%
Trail hiking	32%	48%	46%
Visit a Provincial Park and/or Ecological Reserve	30%	52%	44%
Whale watching	28%	47%	36%
Sightseeing boat tour	27%	48%	42%
Wildlife viewing	22%	39%	37%
Iceberg viewing	21%	44%	43%
Hiking in wilderness areas	21%	38%	32%
Bird watching	21%	37%	27%
Guided tours	11%	20%	16%
Visit a nature park	11%	17%	14%
Geological tour/fossil observation	8%	14%	11%
Fishing (other than guided trip)	8%	7%	9%
Berry picking	7%	8%	9%
Botanical garden/plant observation	7%	11%	9%
Golfing	6%	5%	6%
Sea kayaking	3%	5%	5%
All-Terrain Vehicle (ATV) touring	3%	2%	4%
Fishing (guided trip)	2%	4%	4%
Freshwater canoeing/kayaking/rafting	2%	3%	4%
Cycling	2%	2%	2%
Hunting - big game (black bear, moose, caribou)	1%	3%	2%
Mountain biking	1%	1%	1%
Hunting - small game and birds	1%	0%	0%

Please note that the data presented for non-resident automobile visitors was collected at Port-aux-Basques and Argentia while the data presented for non-resident air visitors was collected at the St. John's and Deer Lake airports. Also note, the "percentage of parties participating" is not additive across activities. Visitors engaged in these activities anywhere in the province, not necessarily in the region specified.

National Historic Sites and lighthouses were popular places visited by non-residents reporting an overnight trip to the Western Region



National Historic Sites (57%) and lighthouses (55%) both attracted over half of non-resident travel parties reporting an overnight trip to the Western Region. Visiting craft/gift shops was also on the agenda of almost two thirds (64%) of these visitors.

Table 12 presents the varying visitation/participation levels for other attractions, sites and events showing that those visitors reporting an overnight visit to the Western Region pursued activities to a much greater extent than visitors in general but to a lesser extent than vacation/pleasure travellers.



Table 12

**2011 Non-Resident Travel Parties Reporting an Overnight Visit to the Western Region
In-Province Visitation to Other Attractions/Sites/Events**

(% Parties - May to October)

	Overall	Vacation/ Pleasure Visitors	Western Region Overnight Visitors
Craft / gift shops	54%	69%	64%
National Historic Sites	51%	73%	57%
Lighthouses	44%	69%	55%
Provincial Historic Sites	38%	55%	41%
Museums / Archives	37%	59%	43%
Visitor Information Centers	37%	66%	56%
Other shopping	36%	39%	37%
Galleries/Exhibits	34%	51%	39%
Nightclubs / lounges / pubs	32%	33%	26%
Interpretation / Science Centers	25%	44%	37%
Live performing music presentations / concerts	21%	28%	22%
Local festivals / events	16%	21%	16%
Archaeological sites	16%	30%	24%
Other historic sites	15%	24%	18%
Live performing theatre presentations / plays or dinner theatres	11%	20%	16%
Historic event celebration	4%	6%	4%
Sports events / tournaments	3%	3%	2%
Genealogical searches / other research	2%	3%	2%
Visit the French Islands of St. Pierre & Miquelon	2%	5%	3%
Spa visit	2%	1%	1%
Come Home Year Celebration	1%	1%	2%

Please note that the data presented for the non-resident automobile visitor was collected at Port-aux-Basques and Argenteia while the data presented for the non-resident air visitor was collected at the St. John's and Deer Lake airports. Also note, as with the Zones visited, the "percentage of parties participating" is not additive across activities. Visitors visited attractions or engaged in these activities anywhere in the province, not necessarily in the region specified.

DEMOGRAPHICS

Non-resident visitors reporting an overnight visit to the Western Region (Economic Zones 6-10) tended to be older than non-resident visitors on average and were well-educated.

Fifty percent of non-resident visitors to the province who reported an overnight trip to the Western Region during May to October of 2011 were age 55 or older, including 23% who were 65 years or older. Compared to non-resident visitors overall, visitors who reported an overnight visit to the Western Region were slightly older than visitors in general.

More than three quarters (76%) of non-resident visitors that reported an overnight visit to the Western Region graduated university (49% with an undergraduate degree and 27% with a post-graduate degree), while 10% indicated a level of education less than high school. Non-resident visitors who reported an overnight visit to the Western Region reported similar education levels as non-resident visitors overall.

Almost one half (46%) of travel parties that reported an overnight visit to the Western Region reported an average annual household income of greater than \$100,000 while 10% reported incomes of less than \$40,000. Non-residents who reported an overnight visit to the Western Region reported similar household incomes as travellers in general.



Table 13
2011 Non-Resident Visitors Reporting an Overnight Visit to the Western Region:
Age

	Overall	Western Region Overnight Visit
Under 35	20%	20%
35 – 44	13%	10%
45 – 54	22%	19%
55 – 64	27%	27%
65 and Over	19%	23%

Table 14
2011 Non-Resident Visitors Reporting an Overnight Visit to the Western Region:
Education

	Overall	Western Region Overnight Visit
High School or Less	9%	10%
Community/Technical College	13%	14%
University	51%	49%
Post Graduate	27%	27%

Table 15
2011 Non-Resident Visitors Reporting an Overnight Visit to the Western Region:
Average Annual Household Income

	Overall	Western Region Overnight Visit
Less than \$40,000	8%	10%
\$40,000 - \$69,999	21%	21%
\$70,000 - \$99,999	22%	23%
\$100,000 - \$149,999	25%	24%
\$150,000 or more	24%	22%

Economic Zone Map

